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Helping Women Make Smart Money Decisions
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Initial Consultation: Client Homework

1. List of Goals (e.g. financial, career/business, personal)

2. List of Assets (everything you own):

   A. Financial (e.g. bank accounts, investments, retirement accounts, etc.)

   B. Non-financial (real estate, autos, businesses, jewelry, art, etc.)

   C. Insurances (e.g. health, disability, LTC, life, HO, auto, professional)

3. List of Liabilities (list of everything you owe)

4. Tax returns (recent; personal & business, if business owner)

5. Summary of income/inflows (e.g. job/business, IRA, SS, investment, rent, trust)

6. Budget (annual or monthly; including irregular expenditures such as X-mas/ Hanukkah & vacations)

7. Legal Documents (e.g. will, living will/ health care proxy, durable power-of-attorney, trusts, divorce decrees)

8. Credit Reports (i.e. 3 Bureaus: Equifax, Experian, TransUnion; Free 1x/yr: www.AnnualCreditReport.com)